

Module 7

Chapter 5

Letters & Notifications

Chapter Overview

Purpose	This chapter contains procedures to Define Standard Letters used for notifications and generates them either automatically or manually.
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Chapter Contents

Topic	Page
Defining a Standard Letter	3
Submitting an Automatic Letter Request	4

Before You Begin

You can manage enrollments by issuing standard letters to students, triggered by changes in enrollment status. For example, you can set up a standard enrollment confirmation letter that is triggered when a student's enrollment status is set to *Placed*.

You can issue standard letters to students for the following:

- Acknowledging requested enrollment.
- Confirming placed enrollments to include date, venue, and instructors.
- Reporting for the instructors with a student roster.
- Following-up for non-response, non-payment, or non-attendance.
- Acknowledging cancellations.
- Preparing certificates of successful course completion, when needed.
- Comprising standard text with a number of embedded variables in it.

When you print the letter, the variables are replaced with specific items of data, such as name and address details for different people.

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Chapter Overview, Continued

Before You Begin (continued)

If you create your standard letters as reports, you can submit a concurrent request in the **Request Letter** window to generate the letter.

Microsoft Word	Another Word Processor
You can use the Letter Generation window to generate the mail merge file online. This window uses Object Linking and Embedding (OLE) to display the letter. When you invoke Microsoft Word from this window, your standard letter is automatically loaded and ready to be merged with the mail merge file.	You can submit a concurrent request in the Request Letter window to generate the mail merge file. When the concurrent request is complete, you can use your word processor's mail merge facilities to create the merged letters.

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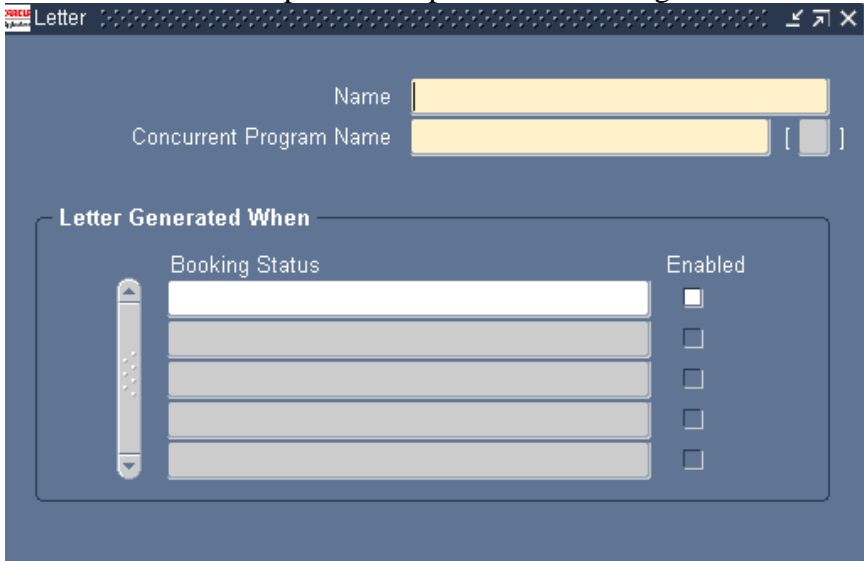
Defining a Standard Letter

Who Does It



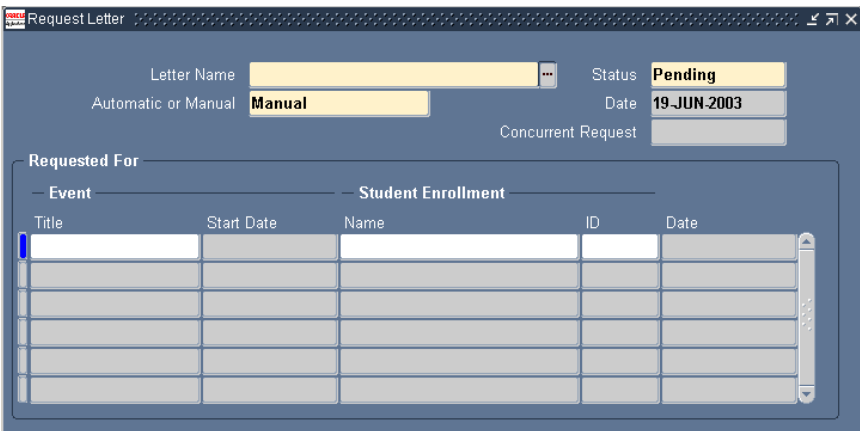
The OTA Training Administrator, OTA Personnelist, and OTA Training Coordinator have access to this process.

Defining a Standard Letter Type

Step	Action	
1	Navigation Path → <i>Letters</i> → <i>Definitions</i> → <Open>.	
2	<p>The Letter window opens. Complete the following data fields:</p> 	
	Data Fields	Description/Action
	Name	Enter a name for the letter
	Concurrent Program Name	Click the LOV and select the Concurrent Program Name assigned by your System Administrator.
	Booking Status	Click the LOV and select the enrollment statuses to create letter requests automatically for each status. The Enabled checkbox is selected for each one. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.
3	Save your action.	

Submitting an Automatic Letter Request


Submitting an Automatic Letter Request

Step	Action																
1	Navigation Path → <i>Letters</i> → <i>Requests</i> → <Open> .																
2	<p>The Request Letter window opens. Complete the following data Fields:</p> 																
	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Letter Name</td><td>Query the letter you need.</td></tr> <tr> <td>Automatic or Manual</td><td>Auto-populates with Manual but you can override with Automatic.</td></tr> <tr> <td>Status</td><td>Auto-populates with Pending but you can override with Requested.</td></tr> <tr> <td>Date</td><td>Auto-populates with today's date.</td></tr> <tr> <td>Concurrent Request</td><td>See below</td></tr> <tr> <td>Requested For Region:</td><td></td></tr> <tr> <td>Name</td><td>Click the LOV to select an employee name. You can add more names manually.</td></tr> </table>	Data Field	Description/Action	Letter Name	Query the letter you need.	Automatic or Manual	Auto-populates with Manual but you can override with Automatic.	Status	Auto-populates with Pending but you can override with Requested.	Date	Auto-populates with today's date.	Concurrent Request	See below	Requested For Region:		Name	Click the LOV to select an employee name. You can add more names manually.
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Submitting an Automatic Letter Request, Continued

Submitting an Automatic Letter Request (continued)

Step	Action
3	Save your action. A concurrent request ID number opens in the Concurrent Request data field. When the Concurrent Manager has processed the request, it changes the status to Completed. You can query the request ID in the Concurrent Requests window and monitor its progress.
	Caution: If you are using a word processor to merge the data file, you need to save the merged letters you generate. If you do not, when you exit the word processor, you lose the letters. You do not lose the data file or the skeleton letter, however.

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